

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from
November 17, 2007 to March 17, 2008

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Update from Restaurantchains.net on growing and emerging restaurant concepts

Growing Concepts that have grown by at least 5% (if less than 50 units).

Wheat Ridge, CO-based QDOBA MEXICAN GRILL (founded 1995) has increased by 43 units, from 371 to 414 (12% growth) and entered into the state of MS. The restaurants are fast casual, open for lunch and dinner, with a \$4-\$10 per person check average. Units seat about 80. Beer and wine are served. Catering is available. Trading areas are AK, AL, AR, AZ, CA, CO, DC, FL, GA, IA, ID, IL, IN, KY, LA, MA, MD, MI, MN, MO, MS, MT, NC, ND, NE, NJ, NV, NY, OH, OK, OR, PA, SC, SD, TN, TX, VA, WA, WI, WV, and WY. Units are 77% franchised. Qdoba is a subsidiary of San Diego, CA-based Jack in the Box, Inc.

New York, NY-based GERBER GROUP (founded 1991) has increased by 1 unit for their Mexx Kitchen concept, from 1 to 2 (100% concept growth) and 1 unit for Stone Rose, from 2 to 3 (50% concept growth). In addition, two new concepts were added: Moonstone Lounge (1 unit) and Sweetwater Saloon (1 unit). Overall company increase was from 24 to 28 (17% company growth). These are upscale bar/nightclub venues, some serving food. Private function space is available. Concepts are Beach House (1), Maxim Beach (1), Mexx Kitchen (2), Midnight Rose (1), Moonstone Lounge (1), Oasis (1), Rise Lounge (1), Rose Bar (1), Stone Rose (3), Sweetwater Saloon (1), The Living Room (3), The Penthouse (1), The Whiskey (2), Underbar (1), Wetbar (1), Whiskey Blue (4), Whiskey Park (2), and Whiskey Sky (1). Trading areas are AZ, CA, IL, LA, MA, MS, NY, Mexico and Spain. New locations (Whiskey Park and The Living Room) will open in Atlanta, GA, Spring '08.

EMMETT'S ALE HOUSE of West Dundee, TX (founded 1999) has increased by 1 unit, from 3 to 4 (33% growth). Locations are casual/upscale with seating for about 250 and a full bar. The per person check average is \$15-30+. Catering and banquets are offered. All locations are in IL.

The owners of PACIFICO in Port Chester, NY have opened a new concept called Palomino increasing 1 unit from 3 to 4 (33% growth). Current concepts are Pacifico (2), Palomino (1) and Sonora (1). These are upscale South American restaurants with full bar and seating for about 150. Catering and banquets are offered. The check average is around \$15-\$30 per person. Locations are in CT and NY.

CRESCENT MOON of Atlanta, GA (founded 1995) has increased by 1 unit, from 2 to 3 (50% growth). These are fast casual restaurants with seating for about 40. Meal periods are breakfast, lunch and dinner. Beer and wine are served and banquets are offered. The check average is around \$6-\$12+ per person. All are located in GA.

SEÑOR TEQUILA of Charleston, SC has increased by 1 unit, from 3 to 4 (33% growth). Locations are family/casual Mexican restaurants with full bar. Seating is for about 100. The per person check average is around \$8-\$20. All are located in SC.

Scottsdale, AZ-based NRGIZE LIFESTYLE CAFE has increased by 16 units, from 36 to 52 (44% growth) and entered into IN, PA and WI. These are quick serve juice/smoothie bars, mostly located inside health clubs. Units are open for lunch and dinner hours, with a \$2-\$6 per person check average. Trading areas are AZ, CA, CT, FL, GA, IL, IN, NJ, NY, OR, PA, TX, WA, and WI. All units are franchised. Nrgize Lifestyle Café is a subsidiary of Scottsdale, AZ-based Kahala Corp.

CAFE MOSAIC based in Richmond, VA (founded 1994) has increased by 1 unit, from 2 to 3 (50% growth). These are family/casual restaurants with Mediterranean cuisine. Beer and wine are served and seating is for about 125. The check average is around \$8-\$20 per person. Locations are in SC and VA.

BUSBOYS AND POETS based in the District of Columbia (founded 1985) has increased by 1 unit, from 1 to 2 (100% concept growth) and expanded into VA. There is a second concept called Luna Grill (1 unit). Overall company growth is from 2 to 3 (50% company growth). Units are typically family/casual with seating for about 200. The per person check average is around \$8-\$20. Locations are in DC and VA.

GATTI'S PIZZA based in Austin, TX (founded 1969) has increased by 4 units, from 136 to 140 (3% growth) and expanded into MS. These are buffet pizza restaurants with seating for around 200. Catering and banquets are offered. Locations are more than 80% franchised and are in IN, KY, LA, MS, NC, OH, SC, TN, TX and VA.

Concepts with 20 units or less who grew by at least 2 units.

Sewell, NJ-based VENUTO'S OLD WORLD PIZZA (founded 2007) has increased by 6 units, from 2 to 8 (75% growth) and entered into PA. All other locations are in NJ. These are quick serve pizzerias, open for lunch and dinner. Some units may have seating for up to 60. Delivery and online ordering are available. A new location is scheduled to open in Palm Coast, FL later this year. All units are franchised.

Colorado Springs, CO-based WILD WINGS N THINGS has increased by 5 units, from 8 to 13 (63% growth) and entered into MS and NV. All other locations are in CO. The restaurants are quick serve, with a \$4-\$10 per person check average. Beer and wine are served. Units seat about 30 and are open for lunch and dinner. Franchising opportunities are available.

Concepts previously written about in the past 18 months.

Minnetonka, MN-based FAMOUS DAVE'S (founded 1995) has increased by 11 units, from 156 to 167 (7% growth). We wrote about this concept on 1/9/07 (6% growth) and on 5/15/07 (2% growth). These are family/casual BBQ restaurants, open for lunch and dinner, with a \$6-\$15+ per person check average. Units have a full bar and seating for about 250. Catering is available. Units are 69% franchised and located in the states of AR, AZ, CA, CO, CT, FL, GA, IA, IL, IN, KS, KY, MA, MD, MI, MN, MO, MT, ND, NE, NH, NJ, NV, NY, OH, OK, PA, SD, TN, TX, UT, VA, WA, WI, and WV.

Little Rock, AR-based WHOLE HOG CAFE has increased by 2 units, from 9 to 11 (22% growth). We featured this concept in our 10/16/07 newsletter (80% growth). They were also ranked #2 on our January '08 Top Ten Fastest Growing Concepts list. The restaurants are fast casual BBQ, open for lunch and dinner, with a \$4-\$10 per person check average. Beer and wine are served. Seating is for about 125. Trading areas are AR, LA, NM, and TN.

Rockville, MD-based CALIFORNIA TORTILLA (founded 1995) has increased by 8 units, from 30 to 38 (27% growth) and entered into PA. We featured this concept on 5/1/07 (12% growth) and again on 10/23/07 (15% growth). These are fast casual Mexican restaurants, open for lunch and dinner, with a \$4-\$10 per person check average. Select locations also serve breakfast. Beer and wine are served. Seating is for about 60. Catering is available. Between 80 and 90% of units are franchised. Trading areas are DC, DE, FL, MD, PA, VA, and WV.

TGI FRIDAY'S headquartered in Carrollton, TX (founded 1965) has increased by 16 units, from 902 to 918 (2% growth). Units are family/casual with full bar and seating for about 250. Full bar, catering and banquets are offered. We reported on this concept in our 7/17/07 newsletter (2% growth). Locations are about half franchised and are in AK, AL, AR, AZ, BC, CA, CO, CT, DE, DC, FL, GA, IA, ID, IL, IN, KS, KY, MA, LA, MD, ME, MI, MN, MO, MS, NC, ND, NE, NH, NJ, NM, NV, NY, OH, OK, ON, OR, PA, RI, SC, SD, TN, TX, UT, VA, VT, WA, WI, WV and nations worldwide.

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